

Information Technology Services Department Guidelines

The Vice-President of Information Technology Services, along with the President, is responsible for raising the awareness of the management team to the value of Information Technology as an enabler of the business to achieve its goals more effectively and efficiently, and then working with the management team to agree upon and implement a series of initiatives.

The Vice-President and his team will:

- Ensure that the business is utilizing information and technology appropriately and in support of the business's goals.
- Provide leadership in the development of the Business Plan by providing ideas on how technology can be used to either save time or reach more customers
- Conduct a "Capabilities" survey to determine what level of knowledge and interest the business's members have in PCs, e-mail and the Internet.
- Establish a set of goals per department on their requirements for technology and the training required.
- Determine if policies are required to go with the initiatives identified, such as editorial review for a Web site, and proposals for inclusion in the Company By-laws.
- Conduct training or assign a "buddy" to ensure the necessary members can achieve the goals in the plan. (i.e., communicate questions to each other, maintain records electronically, or set up a Web site to advertise the product or service).
- As defined in the Business Plan, create new spreadsheets, presentations or graphics, builds Web site, posters, signs or other materials required by each department.

The specific duties of the Vice-President of Information Technology Services are as follows:

DEVELOP AND IMPLEMENT AN INFORMATION TECHNOLOGY PLAN

The Vice-President of Information Technology Services develops the Information Technology section of the company's Business Plan. The *Capabilities Worksheet* illustrates a survey that can be used to initially determine what the management team is interested in doing with Information Technology, and then to survey the rest of the members to understand what their level of knowledge is and what they need to know. After gaining agreement from the management team, the Vice-President of Information Technology Services must allocate the work to his team. The *I.T. Plan Worksheet* can assist in expressing the I.T. goals and actions needed. The plan must address what training is needed by each and how it will be done to ensure that they can use technology to the level needed; what guidelines must be communicated; and what projects are requested. When it is completed the Vice-President of Information Technology Services presents the plan to the business's members for approval at the weekly meeting. The Vice-President is responsible for implementing the plan. Team members would be assigned tasks under his direction.

Typical initiatives might include:

- E-mail – who needs to be set up on a free I.D. (i.e., Hotmail), and who will do it.
- Record keeping – who is fluent in Microsoft Excel and can assist in the use of the spreadsheets for record keeping. Linked workbooks or sheets could be set up. Who will work with each Vice-President? Or who will train someone to do it?
- If the Marketing and Sales Department requires advertising material, determine what they wish, what software (PowerPoint, Adobe, etc) is required to produce it, and who has the knowledge and access to a computer. Who will undertake to produce it?
- If a Web site is desired, define what it will look like and where it will be hosted. List the policies necessary for integrity, and the roles required to ensure its accuracy. Plan the steps required and the person doing them. Be careful to determine exactly when it must be completed.

MAINTAIN VARIOUS RECORDS

The Vice-President of Information Technology Services is responsible for maintaining accurate status on the I.T. Plan and the business's action plan.

Ensure that any expenses are identified by the appropriate Vice-President for initiatives they are sponsoring, and forward any purchases to them for approval.

SAFEGUARD COMPANY RECORDS

The Vice-President is responsible for identifying, creating, distributing and maintaining policies that may be needed to support a given initiative. For example, if the management team chooses to use e-mail, the Vice-President must ensure that each member agrees to use it ethically and professionally. Or if he/she wishes to track customer information, then a policy is needed to confirm that the information will be considered private, not sold to others, and destroyed at the end of the program.

ACT AS LIAISON WITH THE SHAREHOLDERS

This involves communicating with the shareholders on what Information Technology approaches are being adopted and answering their questions.

PROVIDE LEADERSHIP

The Vice-President of Information Technology Services must provide leadership to the members of his or her department. Positions will vary from business to business, but they may include a PC Support Specialist, a Technical Support Specialist, a Developer and/or a Web site Editor. You will be expected to meet with them regularly to provide advice and supervision.

RECORDS AND RECORD KEEPING RESPONSIBILITIES

Maintain the I.T. Plan and monitor progress.